

Certification 2005 – Checklist B

Appendix (CERT2005B)

April 07, 2005

Appendix A-1

Example of Batch Valuation

Batch Pricing Program

Area: 001

Parcel Selection

- ☒ All Parcels
- ☐ Input File
- ☐ Parcel Set

Property Classes

- ☒ All Property Classes
- ☐ Agricultural
- ☐ Mineral
- ☐ Industrial
- ☐ Commercial
- ☐ Residential
- ☐ Exempt
- ☐ Utility
- ☐ Other classes

From:

To:

Select parcels to process.

Statistics

Parcel:

Count	Selected	Filtered	Processed
Start Time:		End Time:	
Elapsed Time:			
Avg. Parcel Time:		Parcels/Minute:	
Est. Time Left:			

OK Quit Selection Options...

Be sure 001 is entered here.

Use TSB0000-Input File_Select Parcels to create an input file. Otherwise follow the instructions for using RY Memo ID's.

All other buttons should be clicked based on the roll process that you are running. If rolling by review year, the "All Parcels" should be the only button selected.

Select this option to take you to the next screen to use RY memos for Batch Selection.

Selection Options

These options are for further refining of parcel selection.

Relation refers to how the current selection relates to the previous selection. Only one 'EXCLUSIVE OR' can be used in the query on a particular item.

Everything to the left of the 'EXCLUSIVE OR' is compared to everything to the right of it. 'AND' has the highest precedence, 'AND's' will be processed before 'OR's'.

Selection Item:

- ☐ Process Only Vacant (Non-Improved) Land
- ☐ Process Only Improved Land
- ☒ Memo ID

Not Memo ID Relation Add

☐ RY04

Reset

Query List

Memo ID Selection: "RY04"

OK Cancel

These two options should not be checked.

If you are processing by Memo ID, such as review year, you will need to click on Memo ID, then select or not select ID's as needed, then click Add.

NOTE: If using multiple id's, be sure to click Add for each one.

NOTE: Anytime you are using "Not" with multiple entries, the relation will be "And". For example, if you are trying to produce a run that is for all agricultural with the exception of parcels that have memos RY04 and RY03, then the query should be as follows:

NOT "RY03" AND NOT "RY04"

Once you click OK here, you will need to Click OK again to take you to the Batch Pricing Options screen.

Batch Pricing Options

Property Records

☐ Land

☐ Improvements

☒ Both

Value Type

☒ Computed

☐ Assessed

Report file:

☐ Change all pricing methods to Cost?

OK Cancel

This screen should look like this, with the exception of the Report file location. The path to your "datasql" directory on the server should be listed here.

Appendix A-2

Example of Value Change Tracking Edit Report

Value Change Tracking Edit Report

Area: 001

Parcel Selection:
☒ All Parcels
☐ Input File
☐ Parcel Set

Property Classes:
☒ All Property Classes
☐ Range to

☐ Agricultural
☐ Mineral
☐ Industrial
☐ Commercial
☐ Residential
☐ Exempt
☐ Utility
☐ Other classes

Taxing District:
☒ All Districts
☐ District

From:
 To:

Select parcels to process.

Statistics
Parcel:
Count Selected: Filtered: Processed:
Start Time: End Time:
Elapsed Time:
Avg. Parcel Time: Parcels/Minute:
Est. Time Left:

OK Quit Selection Options...

Be sure this says 001

Use TSB0000-Input File_Select Parcels to create an input file. Otherwise, follow the instructions to use RY Memo ID's.

All other buttons should be clicked based on the roll process that you are running. If rolling by review year, the "All Parcels" should be the only button selected.

Select this option to take you to the next screen

Selection Options

These options are for further refining of parcel selection.
Relation refers to how the current selection relates to the previous selection. Only one 'EXCLUSIVE OR' can be used in the query on a particular item.
Everything to the left of the 'EXCLUSIVE OR' is compared to everything to the right of it. 'AND' has the highest precedence, 'AND's' will be processed before 'OR's'.

Selection Item:
☐ Process Only Vacant (Non-Improved) Land
☐ Process Only Improved Land
☒ Memo ID

Not Memo ID Relation Add
☐ RY04

Reset

Query List
Memo ID Selection:
"RY04"

OK Cancel


These two options should not be checked.

If you are processing by Memo ID, such as review year, you will need to click on Memo ID, then select or not select ID's as needed, then click Add.

NOTE: If using multiple id's, be sure to click Add for each one.

NOTE: Anytime you are using "Not" with multiple entries, the relation will be "And". For example, if you are trying to produce a run that is for all agricultural with the exception of parcels that have memos RY04 and RY03, then the query should be as follows: **NOT "RY03" AND NOT "RY04"**

Once you click OK here, you will need to Click OK again to take you to the next screen.

Edit Report Options 

What to print:

- ☒ Parcels which need to be priced
- ☒ Parcels which need to have values allocated
- ☐ Parcels which have unposted changes
- ☐ Parcels which need assessment notices printed

Effective dates: to

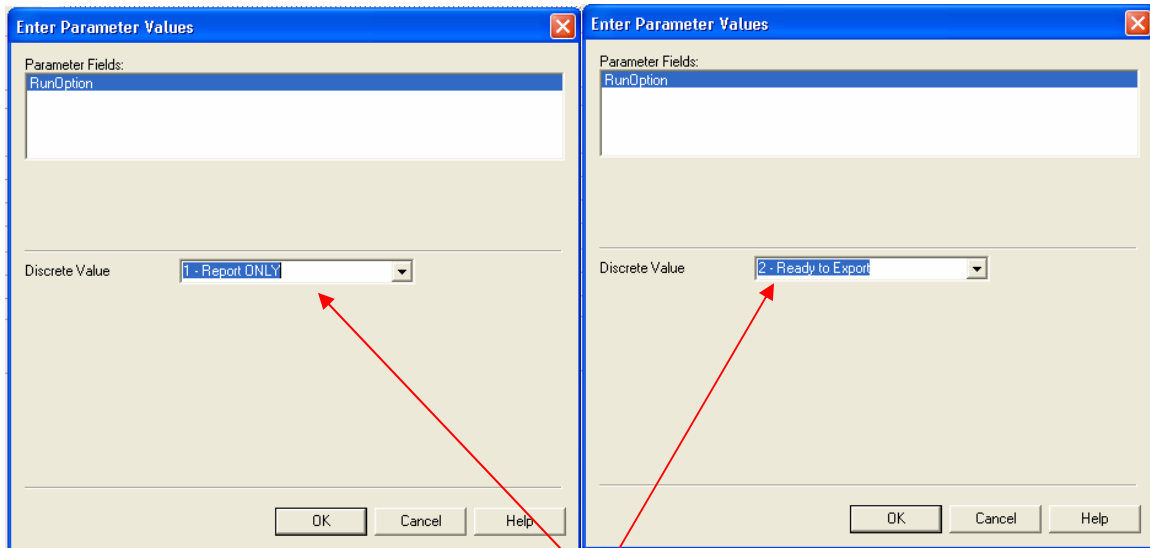
Be sure this screen is checked as noted.

Appendix A-3

How to Run TSB1830C – Batch Valuation Analysis

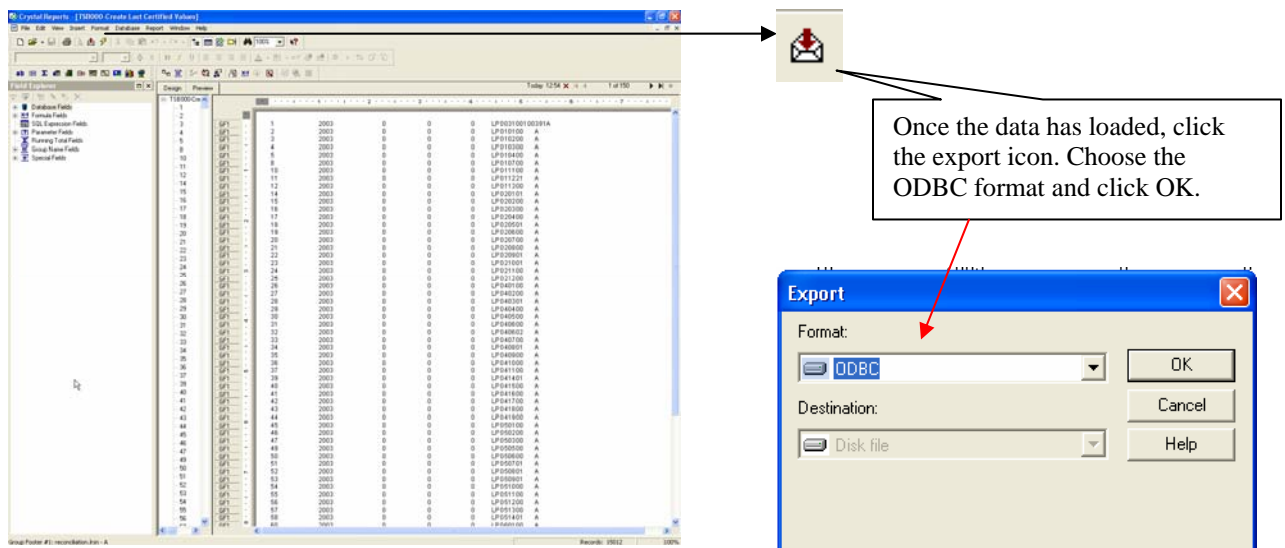
Step 1: In Query Analyzer, open TSB1831C-Drop Last Certified Table.sql. This script will remove the LastCertified table from your common database. If this is the first time you've run this report, then you can skip this step. Otherwise, this step is required each time this report is run.

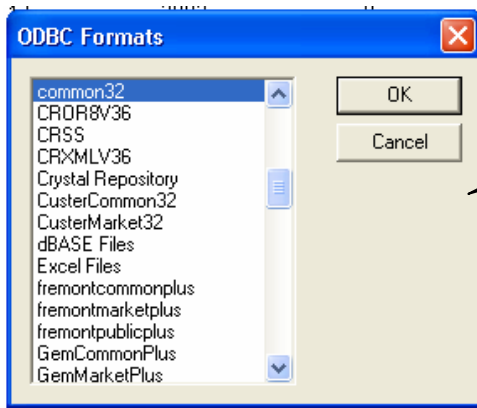
Step 2: In Crystal Reports, open TSB1832-Last Certified Input.rpt. This report will create a table in common with the last certified values. Run the report as follows:



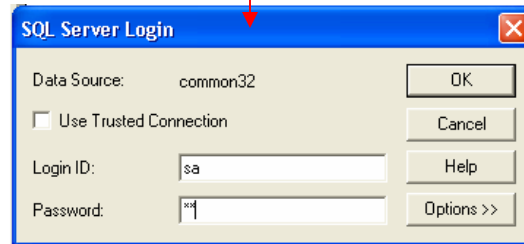
AT the Parameter Values window, choose whether to run the report in “Report ONLY” option or “Ready to Export” option. If you want to see the data in a normal report before creating the LastCertified table, then choose “Report ONLY.” Otherwise select “Ready to Export.” If you choose report only, you will have to re-run the report in “Ready to Export” before you can continue.

Once you have selected “Ready to Export” click the yellow lightning bolt and the report will load as follows:





Next, choose the common32 ODBC format and click OK. Then enter your SA password and click OK.



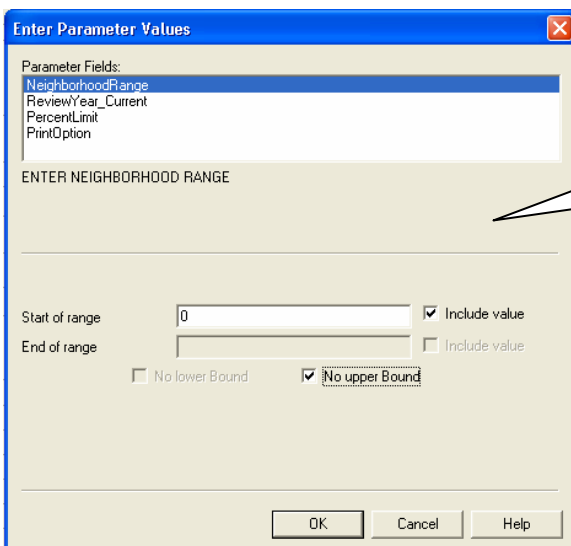
Next, enter the name of the table to be created and exported to... Please be sure to type the name exactly as you see it here or your report will not run in Step 3.

Click OK.



The "Exporting Records" window will appear and show the progress of the export. When completed the window will disappear and the export is complete. You are now ready for Step 3.

Step 3: Open TSB1830C-Batch Valuation Analysis.rpt and click the yellow lightning bolt to run:



Enter the parameter for Neighborhood. If you want total value for all parcels, run on Neighborhood zero through 9999999 or click no upper Bound.

Enter Parameter Values

Parameter Fields:

- NeighborhoodRange
- ReviewYear_Current
- PercentLimit
- PrintOption

SELECT CURRENT REVIEW YEAR

Discrete Value: 2008

OK Cancel Help

For the review year parameter, click the down arrow and choose the current review year.

Enter Parameter Values

Parameter Fields:

- NeighborhoodRange
- ReviewYear_Current
- PercentLimit
- PrintOption

ENTER PERCENT CHANGE TO CHECK FOR

Discrete Value: 10 - %

OK Cancel Help

For the Percent Limit, click the down arrow and choose the percent change you would like to see highlighted. The parameter will show you parcels with a percent change greater than the parameter you choose. For example, if you wanted to see all parcels with a percent change greater than 30%, you would click on 30 - %.

Enter Parameter Values

Parameter Fields:

- NeighborhoodRange
- ReviewYear_Current
- PercentLimit
- PrintOption

Discrete Value: 1 - (Print all Checked Parcels)

OK Cancel Help

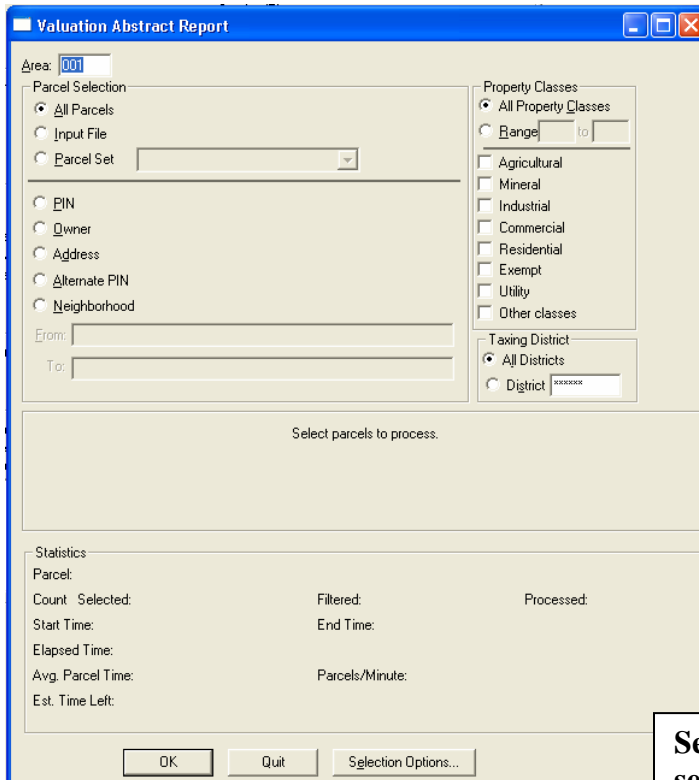
The last parameter is for the type of report you want to see. They are as follows:

1. Will show ALL parcels checked to be posted and their values along with a summary page.
2. Will list only the parcels over or under the percent limit you chose above.
3. Will create only the Summary Page used in balancing.

Click OK to run the report.

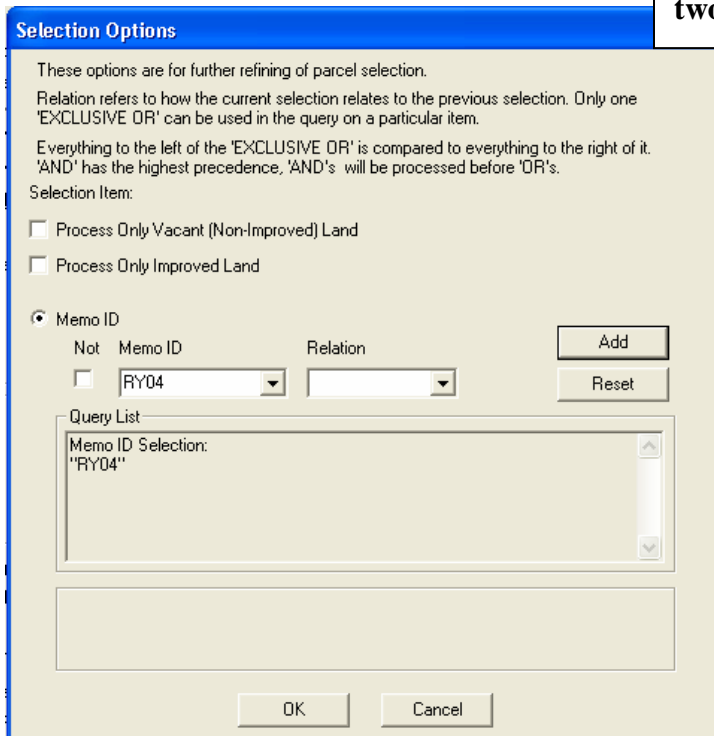
Appendix B-1

Example of Value Abstract Report



The 'Valuation Abstract Report' dialog box is used to configure the report. It includes fields for 'Area' (set to 001), 'Parcel Selection' (radio buttons for All Parcels, Input File, and Parcel Set), and 'Property Classes' (radio buttons for All Property Classes and Range, with checkboxes for Agricultural, Mineral, Industrial, Commercial, Residential, Exempt, Utility, and Other classes). It also has 'Taxing District' options (All Districts or District). A large text area is labeled 'Select parcels to process.' Below this is a 'Statistics' section with fields for Count, Selected, Filtered, Processed, Start Time, End Time, Elapsed Time, Avg. Parcel Time, and Est. Time Left. At the bottom are 'OK', 'Quit', and 'Selection Options...' buttons.

See notes on Appendix A-1 or A-2 to see what needs to be entered on these two screens.



The 'Selection Options' dialog box provides further refinement of parcel selection. It includes instructions on how to use 'EXCLUSIVE OR' and 'AND' in queries. It has checkboxes for 'Process Only Vacant (Non-Improved) Land' and 'Process Only Improved Land'. A 'Memo ID' section includes a 'Not' checkbox, a 'Memo ID' dropdown (set to RY04), a 'Relation' dropdown, and 'Add' and 'Reset' buttons. A 'Query List' section shows a list with 'Memo ID Selection: "RY04"'. At the bottom are 'OK' and 'Cancel' buttons.

Valuation Abstract Options

Values:
☒ Computed
☐ Assessed

Land Values:
☐ Use
☒ Market

Detail print options:
☒ Print parcel detail
☒ One-line detail
Minimum % change to print: %
☐ Print % change for total values only
☐ Disable additional page headers

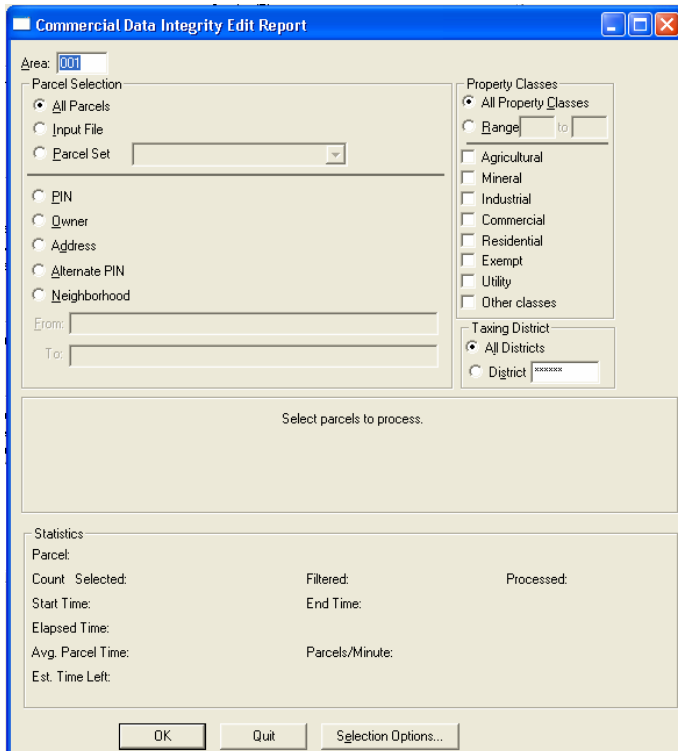
Report file:

OK Cancel

With the exception of the report file path, your screen should be filled in like the above.

Appendix B-2

Example of Commercial Data Edit Report



Commercial Data Integrity Edit Report

Area: 001

Parcel Selection:

- ☒ All Parcels
- ☐ Input File
- ☐ Parcel Set

☐ PIN
☐ Owner
☐ Address
☐ Alternate PIN
☐ Neighborhood

From:
 To:

Property Classes:

- ☒ All Property Classes
- ☐ Range
- ☐ Agricultural
- ☐ Mineral
- ☐ Industrial
- ☐ Commercial
- ☐ Residential
- ☐ Exempt
- ☐ Utility
- ☐ Other classes

Taxing District:

- ☒ All Districts
- ☐ District

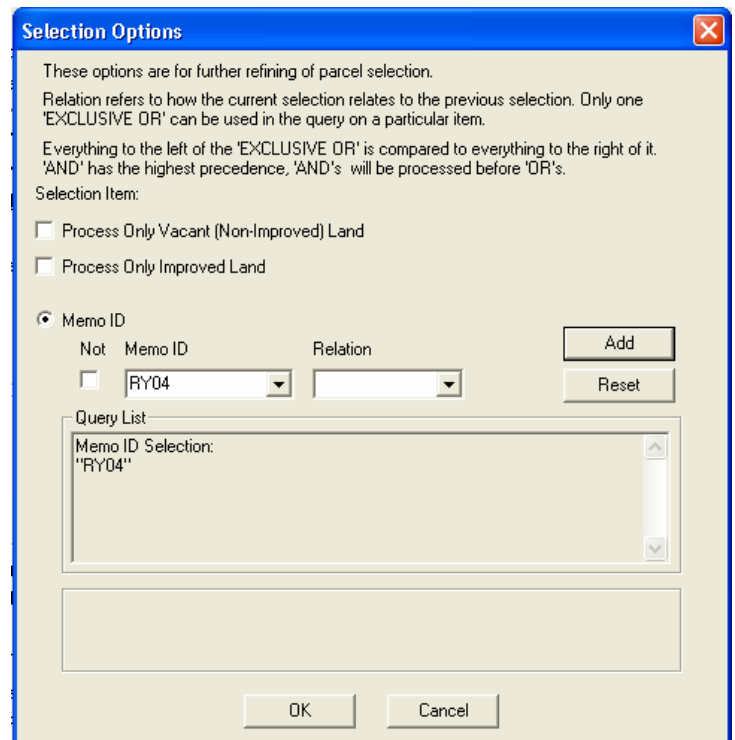
Select parcels to process.

Statistics:

Parcel:	Count	Selected:	Filtered:	Processed:
Start Time:				
End Time:				
Elapsed Time:				
Avg. Parcel Time:				
Est. Time Left:				

OK Quit Selection Options...

See instructions under Appendix A-1 for these first two screens.



Selection Options

These options are for further refining of parcel selection.

Relation refers to how the current selection relates to the previous selection. Only one 'EXCLUSIVE OR' can be used in the query on a particular item.

Everything to the left of the 'EXCLUSIVE OR' is compared to everything to the right of it. 'AND' has the highest precedence, 'AND's' will be processed before 'OR's'.

Selection Item:

- ☐ Process Only Vacant (Non-Improved) Land
- ☐ Process Only Improved Land

☒ Memo ID

Not Memo ID Relation

☐ RY04

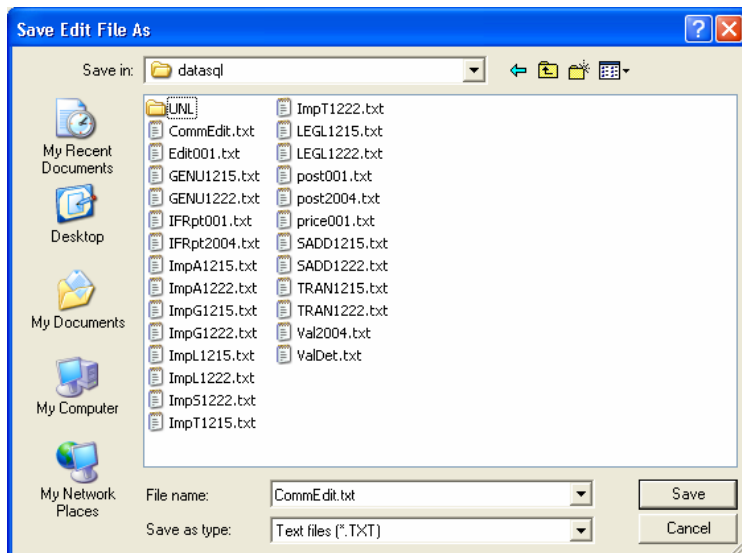
Add Reset

Query List

Memo ID Selection: "RY04"

OK Cancel

As long as the folder data path is the one to your server, leave this screen as is. If not, change the data path to your datasql folder on your server.



Save Edit File As

Save in: datasql

File list:

- CommEdit.txt
- Edit001.txt
- GENU1215.txt
- GENU1222.txt
- IFRpt001.txt
- IFRpt2004.txt
- ImpA1215.txt
- ImpA1222.txt
- ImpG1215.txt
- ImpG1222.txt
- Impl1215.txt
- Impl1222.txt
- ImpS1222.txt
- ImpT1215.txt
- ImpT1222.txt
- LEGL1215.txt
- LEGL1222.txt
- post001.txt
- post2004.txt
- price001.txt
- SADD1215.txt
- SADD1222.txt
- TRAN1215.txt
- TRAN1222.txt
- Val2004.txt
- ValDet.txt

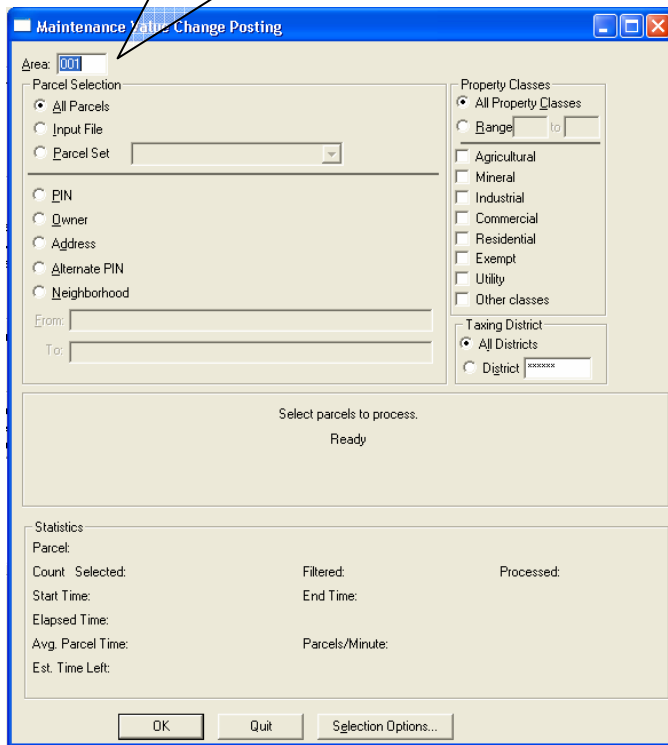
File name: CommEdit.txt

Save as type: Text files (*.TXT)

Save Cancel

Appendix C-1 Example of Post Values

Be sure area is 001



Maintenance Value Change Posting

Area:

Parcel Selection:

- ☒ All Parcels
- ☐ Input File
- ☐ Parcel Set

☐ PIN
☐ Owner
☐ Address
☐ Alternate PIN
☐ Neighborhood

From:
To:

Property Classes:

- ☒ All Property Classes
- ☐ Range to
- ☐ Agricultural
- ☐ Mineral
- ☐ Industrial
- ☐ Commercial
- ☐ Residential
- ☐ Exempt
- ☐ Utility
- ☐ Other classes

Taxing District:

- ☒ All Districts
- ☐ District

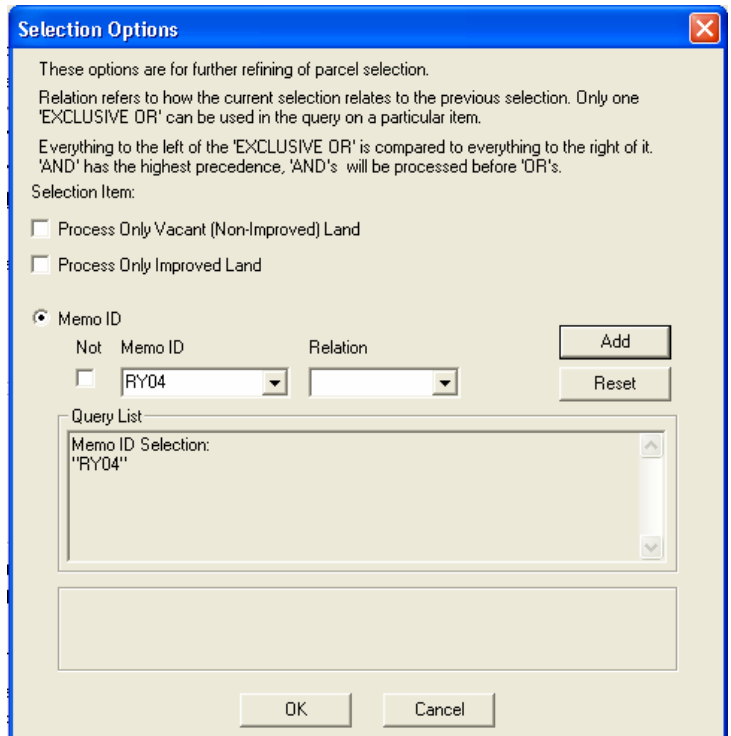
Select parcels to process.
Ready

Statistics:

Parcel:	Count	Selected:	Filtered:	Processed:
Start Time:				
Elapsed Time:				
Avg. Parcel Time:				
Est. Time Left:				

OK Quit Selection Options...

See instructions under Appendix A-1 for these first two screens.



Selection Options

These options are for further refining of parcel selection.

Relation refers to how the current selection relates to the previous selection. Only one 'EXCLUSIVE OR' can be used in the query on a particular item.

Everything to the left of the 'EXCLUSIVE OR' is compared to everything to the right of it. 'AND' has the highest precedence, 'AND's' will be processed before 'OR's'.

Selection Item:

- ☐ Process Only Vacant (Non-Improved) Land
- ☐ Process Only Improved Land

☒ Memo ID

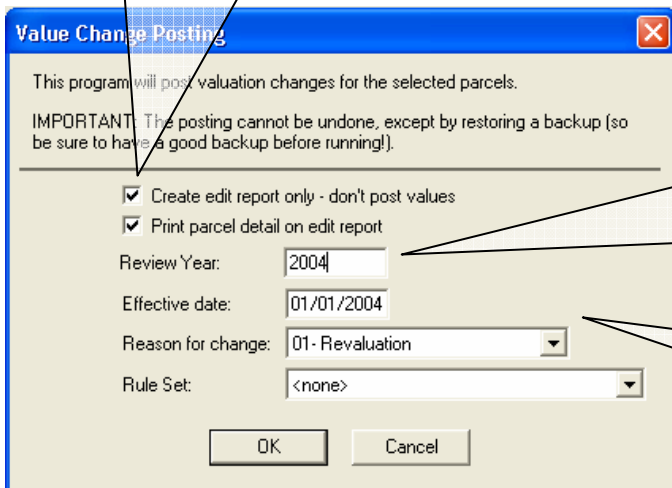
Not	Memo ID	Relation	
<input type="checkbox"/>	RY04		Add
			Reset

Query List

Memo ID Selection:
"RY04"

OK Cancel

When running for the first time, **BE SURE** this is clicked **ON**.
If ready to post in update, **BE SURE** it is clicked **OFF**.



Value Change Posting

This program will post valuation changes for the selected parcels.

IMPORTANT: The posting cannot be undone, except by restoring a backup (so be sure to have a good backup before running!).

- ☒ Create edit report only - don't post values
- ☒ Print parcel detail on edit report

Review Year:

Effective date:

Reason for change:

Rule Set:

OK Cancel

If you are posting the current review year, **BE SURE** the review year you are rolling is entered here.

If you are rolling anything other than current review year, leave this field **BLANK** if running in one batch. However, if you have made category changes and such in previous years, post each year separately and enter the appropriate year in the Review Year Field.

Make sure the effective date is correct and the correct reason code is selected. The reason code should be Revaluation at this time.

Rule Set should be NONE or blank.

Appendix C-2

How to run TSB9500C-Valuation Reports (6 Step Process)

Step 1: In Query Analyzer open TSB9500C-ValRpt_Step01_Delete Work Tables.SQL. This script will delete the work tables in the common database so you can run the following Crystal Reports. Click the green arrow button to run the script.

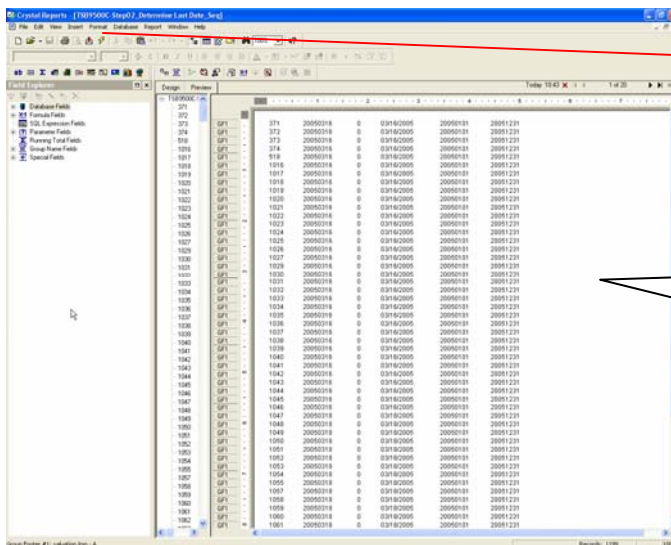
Step 2: In Crystal Reports open TSB9500C-ValRpt_Step02_Determine Last Date_Seq.RPT. This report will be exported into the common database and create the VALUATION_LAST table.

Click the yellow lightning bolt to start the report:

The image displays four instances of the 'Enter Parameter Values' dialog box, arranged in a 2x2 grid. Each dialog box has a blue title bar with a close button (X). The main area is divided into two sections: 'Parameter Fields' and 'Discrete Value'. The 'Parameter Fields' section contains a list box with three items: 'EffcYearStart', 'EffcYearEnd', and 'RunOption'. The 'Discrete Value' section contains a dropdown menu. The four dialog boxes show different values in the dropdown menu: '20050101', '20051231', '1 - Report ONLY', and '2 - Ready to Export'. Each dialog box also has 'OK', 'Cancel', and 'Help' buttons at the bottom.

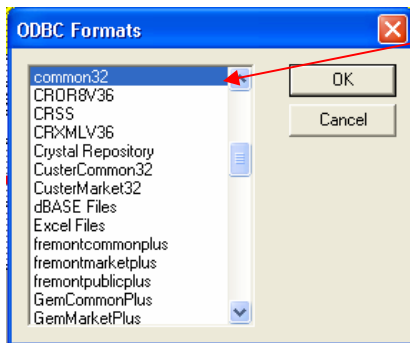
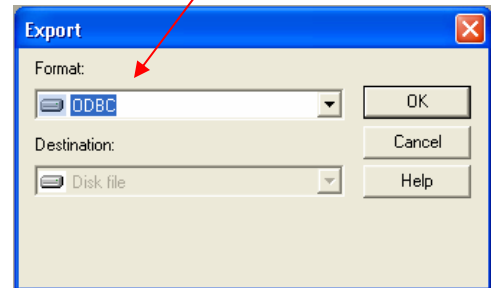
Parameter Values:

- EffcYearStart: This would be the first day of the current review year.
- EffcYearEnd: This would be the last day of the current review year.
- RunOption: You can run the report in 1 – Report ONLY or 2 – Ready to Export. If you want to see the data in a normal report format, then choose the Report Only option, otherwise click on Ready to Export. If you run in report only you will need to re-run the report in Ready to Export before you continue.



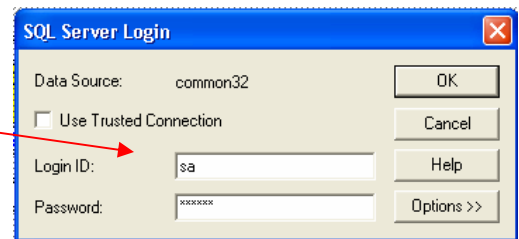
Once the report loads, click the export icon to begin exporting the data to the common database.

Choose the ODBC format. Click OK.



Choose the common32 ODBC format. Click OK.

Next enter your SA password and click OK



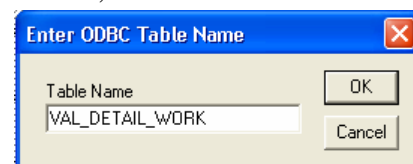
Enter the table name exactly as shown here, or your next report in Step 3 will not run.

The Exporting Records windows shows the progress, when it disappears, the table has been exported and created.



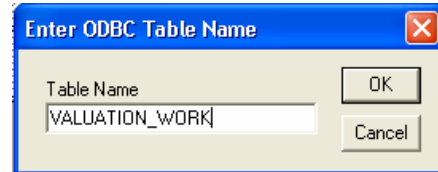
Step 3: In Crystal Reports open TSB9500C-ValRpt_Step03_Determine Detail Entries.RPT.

1. Click the yellow lightning bolt to start the report.
2. The parameter screen gives you the choice of "Report Only" or "Ready to Export." Same as in Step 2. Once you have selected "Ready to Export" follow the same entries as Step 2, EXCEPT for the table name, which is:
VAL_DETAIL_WORK
3. Once the Exporting Records window is gone then the report is finished.



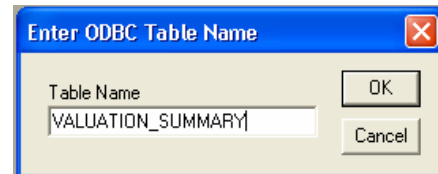
Step 4: In Crystal Reports open TSB9500C-ValRpt_Step04_Determine Valuation Entries.RPT.

1. Click the yellow lightning bolt to start the report.
2. The parameter screen gives you the choice of “Report Only” or “Ready to Export.” Same as in Step 2. Once you have selected “Ready to Export” follow the same entries as Step 2, EXCEPT for the table name, which is: VALUATION_WORK.
3. Once the Exporting Records window is gone then the report is finished.



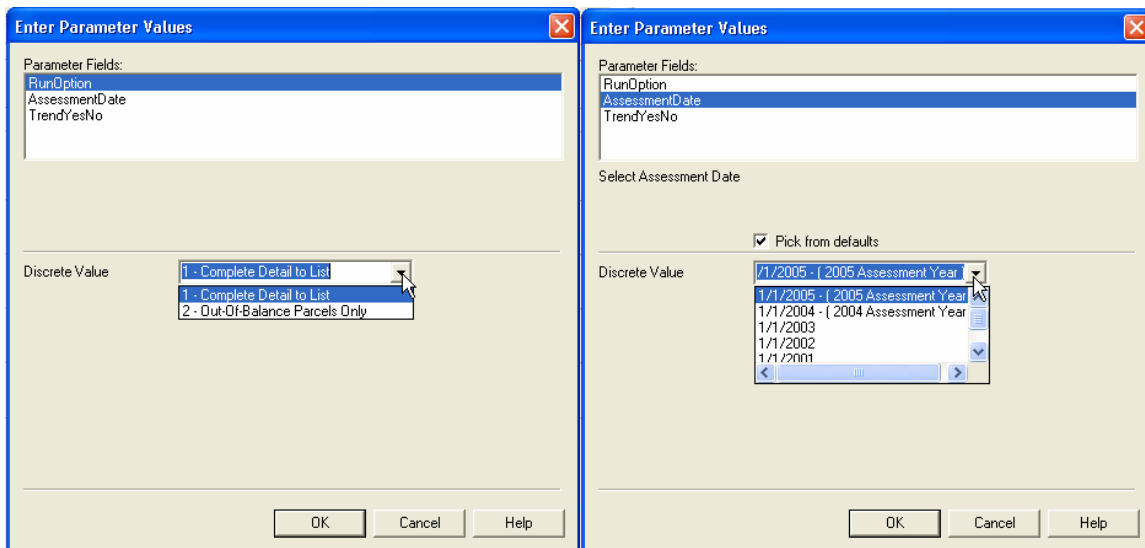
Step 5: In Crystal Reports open TSB9500C-ValRpt_Step05_Determine Summary for Balancing.RPT.

1. Click the yellow lightning bolt to start the report.
2. The parameter screen gives you the choice of “Report Only” or “Ready to Export.” Same as in Step 2. Once you have selected “Ready to Export” follow the same entries as Step 2, EXCEPT for the table name, which is: VALUATION_SUMMARY.
3. Once the Exporting Records window is gone then the report is finished.



Step 6: In Crystal Reports open TSB9500C-ValRpt_Step06_Valuation Reports.RPT.

1. Click the yellow lightning bolt to start the report.
2. The parameter screen is as follows:



RunOption: You can list the Complete Detail for all parcels or just list those parcels that are out of balance (where the Valuation Table and the Val Detail Table do not balance).

AssessmentDate: Choose the current Assessment Year.

Continued next page...

Enter Parameter Values

Parameter Fields:

RunOption
AssessmentDate
TrendYesNo

Are you going to or have you Trended ?

Discrete Value

N - (I am not trending)
N - (I am not trending)
Y_Bef - (I will be Trending)
Y_Alt - (I have Trended)

OK Cancel Help

TrendYesNo: Tell the report whether your are running the report but will not be trending OR you will be trending but have not done so now OR You have trended and this is a final report.

This report is used when you have either re-certified parcels during the Checklist OR you are Trending. TSB9555C or TSB1960C will not pick up value accurately if you re-certify or trend parcels.

Appendix D-1 **Example of Create Valuation Interface** **EDIT REPORT ONLY**

Area 001 here.

Create Valuation Interface File

Interface Format:
☐ Standard
☐ ATEK
☐ BRC
☐ Manatron
☐ Ashe
☐ Bright
☒ New Standard
☐ Assess Roll
☐ Ascend 3

Area: ☐ All Areas ☒ Edit report only

Parcel Selection
☒ All parcel IDs
☐ From:
☐ To:
☒ Select date range
 Effective dates: to
☐ Select all dates

Sort by
☒ Parcel ID
☐ Owner name
☐ Tax acct number

Taxing District
☒ All districts
☐

☒ Only export most recent change for each parcel
 Tax Year:

Value Allocations
☐ none
☒ Create residential allocations for all parcels
☐ Create residential allocations for active homesteads only

Interface file:

Select options and click OK.

OK Cancel Reasons

For the first time, BE SURE 'Edit report only' is checked ON. Verify report.

When ready to create the actual file, turn check mark off.

Verify that dates are correct.

This must be checked on.

All other fields are as shown.

Reason Code Selection

Use the space bar or double-click to toggle selection.

- ☒ 05- Change Usage / S.P.
- ☒ 07- Mobile Home Added
- ☒ 09- Destroyed Property
- ☒ 11- New Construction-Partial
- ☒ 13- New Parcel by Split
- ☒ 15- Removal from F & Ag
- ☒ 17- Combined w/ Another
- ☒ 21- New parcel / S.P. Seg.
- ☒ 23- Assessor Change
- ☒ 26- Value change / S.P.
- ☒ 28- Omitted Property
- ☒ 31- New Classified Timber
- ☒ 35- New Open Space F & Ag
- ☒ 41- Split / Owner's Request

Select All
 Clear All
 OK
 Cancel

Click on 'Reasons' and then click 'Select All.'

Click OK and then click OK on the Create Valuation Interface File screen.

Appendix D-1 continued
Example of Create Valuation Interface
NOT Edit Report Only

Create Valuation Interface File

Interface Format:
☐ Standard
☐ ATEK
☐ BRC
☐ Manatron
☐ Ashe
☐ Bright
☒ **New Standard**
☐ Assess Roll
☐ Ascend 3

Area: 001 ☐ All Areas ☐ Edit report only

Parcel Selection:
☒ All parcel IDs
☐ From:
To:
☒ Select date range
Effective dates: 01/01/2004 to 01/01/2004
☐ Select all dates

Sort by:
☒ Parcel ID
☐ Owner name
☐ Tax acct number

Taxing District:
☒ All districts
☐

☒ Only export most recent change for each parcel
Tax Year:

Value Allocations:
☐ none
☒ Create residential allocations for all parcels
☐ Create residential allocations for active homesteads only

Interface file: J:\assessor\manatron\provalplus\DataSQL\W

Select options and click OK.

OK Cancel Reasons

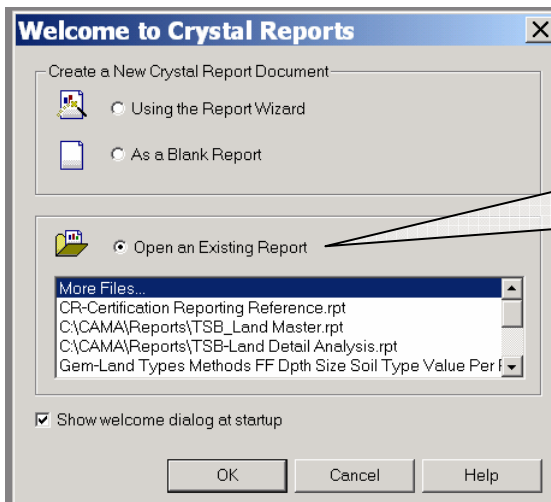
When you click this Off, the **Interface Format** section will light up. Be sure **"New Standard"** is selected.

File path should auto fill from your preferences. Check path to be sure it is correct.

Make sure all other fields on this screen are the same as was with "Edit report only", as well as with the **"Reason Code Selection" screen.**

Appendix Y-1

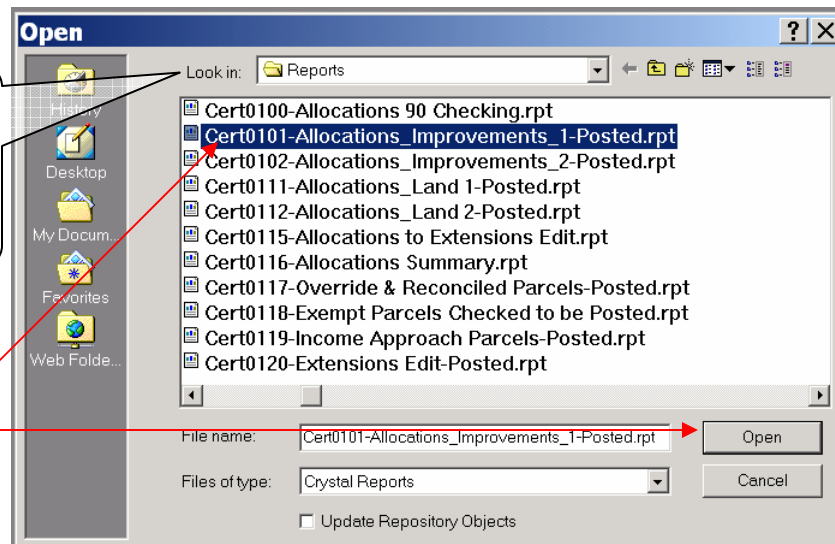
Example of Prompt For Crystal Reporting



When Crystal first opens, you will be at this screen. Say “OK” to “Open an Existing Report”.

This screen should open up to your manatron/provalplus/reports/users folder on your server. If not, change it to that folder. If you choose to save to a different folder, remember which folder you chose.

Highlight the report needed, then click “Open”.



Crystal Reports - [Improvement Allocations Edit 1-Posted]

File Edit View Insert Format Database Report Window Help

Report Header a: Improvement Allocations Edit 1-Posted Cost & Market Methods Only @PrintDate Certification Process @County Number & Name Neighborhood Range: hoodBegin borhoodEnd

Report Header b: Report Comments

Page Header a: @PageTitle

Page Header b:

Parcel	Ext	Id	Impv Type	Prop Class	Cost Method	Allocation Group	Pct	Value	Error Message	Neighb
parcel_id	extens	impr	imp_type	class	dueMethodID	@Group Name-short	AllocPct	value	Invalid Group group	neighbor
parcel_id	extens	impr	imp_type	class	dueMethodID	@Group Name-short	AllocPct	value	Invalid Value	code neighbor
parcel_id	extens	impr	imp_type	class	dueMethodID	@Group Name-short	AllocPct	value	Invalid Class	neighbor

Report Footer: Counter Invalid Groups NOTE 1: When reviewing these entries & they look correct, try re-valuing the parcel, then check to see if you still have an error message. NOTE 2: Also, if an entry looks right but you still get an error message, try changing it then changing it back.

Page Footer: @Program ID @Total Page

When the report sets up, click the "lightning bolt" to run the report.

For almost all of the reports, you will be prompted to enter some kind of parameters, such as beginning & ending neighborhood range. Enter the parameters as needed.

Enter Parameter Values


Parameter Fields:
NeighborhoodBegin
NeighborhoodEnd

Enter beginning neighborhood of Range

Discrete Value: 0 - (default)

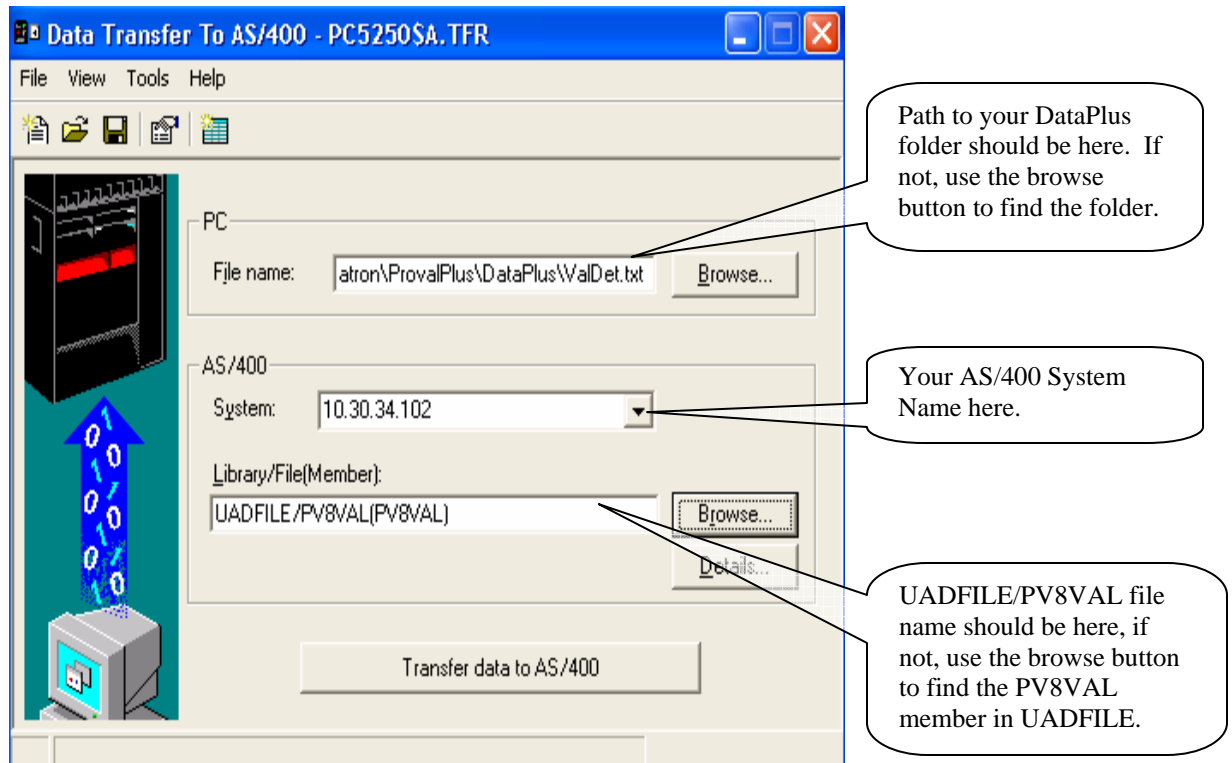
OK Cancel Help

Appendix Y-2 Upload to AS/400

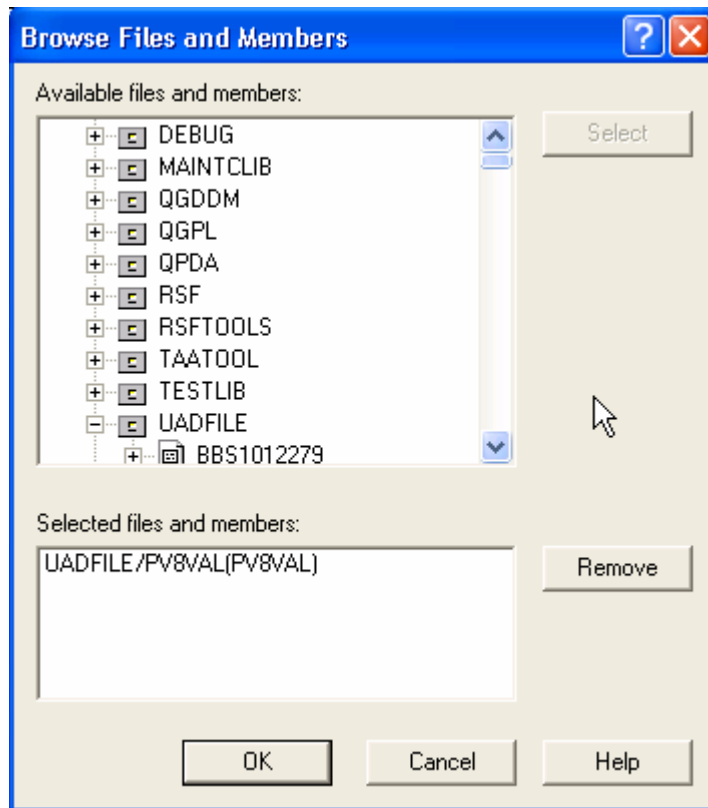
1. In the AS/400, click on the “send files to host”  icon.



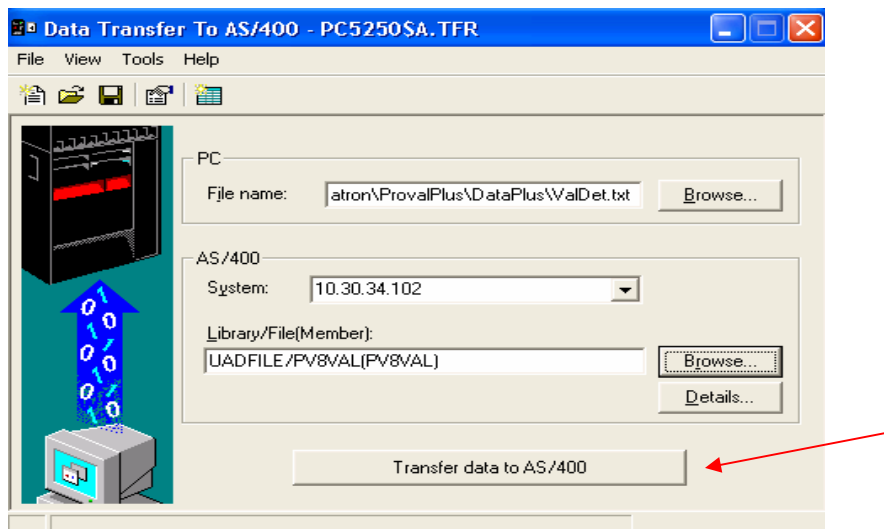
2. Browse to the ProVal detail file to be uploaded (valdet.txt). This file should be located in your Manatron\ProValPlus\DataPlus folder



3. Browse to the AS/400 UAD file - UADFILE/PV8VAL[PV8VAL]
 - Expand “UADFILE”
 - Browse to, and expand “PV8VAL
 - Select the member (PV8VAL)
 - Click the “Select” button, and then click “OK”.

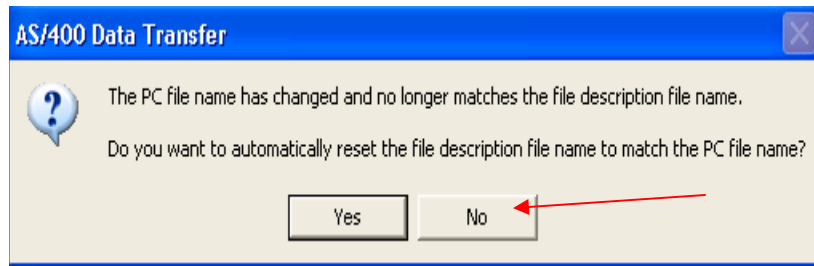


4. Click the “Transfer data to AS/400” to begin the upload

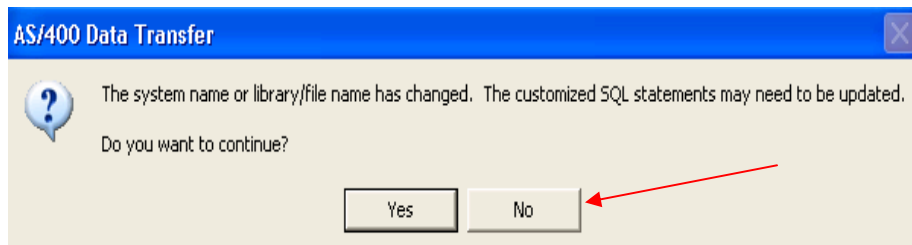



5. If the data uploaded completely, you have finished this step and can return to your checklist instructions, if not please continue with step 6

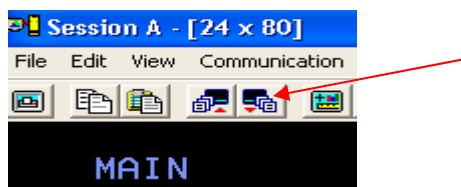
6. If you get a file mismatch message as depicted in the following screen shot, you need to re create your PC file description file (pv8val.fdf). Click “No”



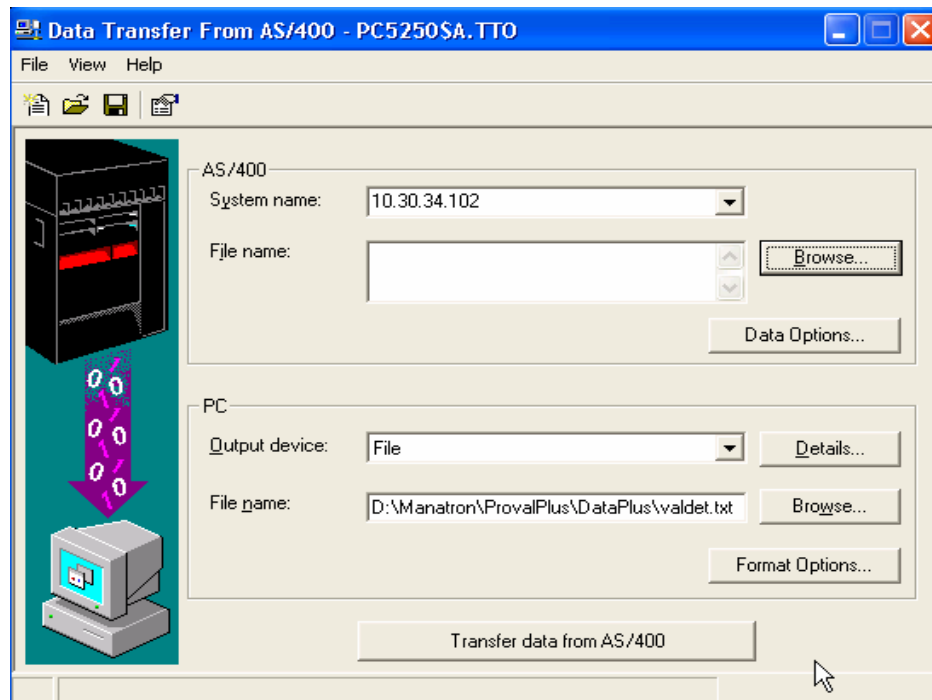
7. You will now be prompted with the following message, Click “No”



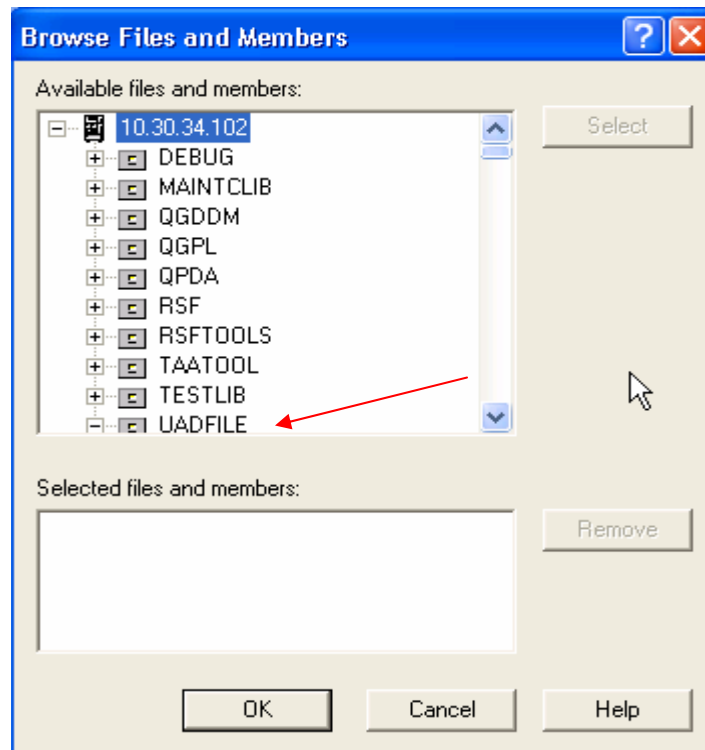
8. Close the “Data Transfer to AS/400” window.
9. Open Windows Explorer and navigate to your dataplus folder.
➤ Rename valdet.txt to valdet_orig.txt (This will preserve your export file which will again be renamed valdet.txt in later prior to uploading).
10. Return to your AS/400 Session
11. Click on the “Receive files from host”  icon



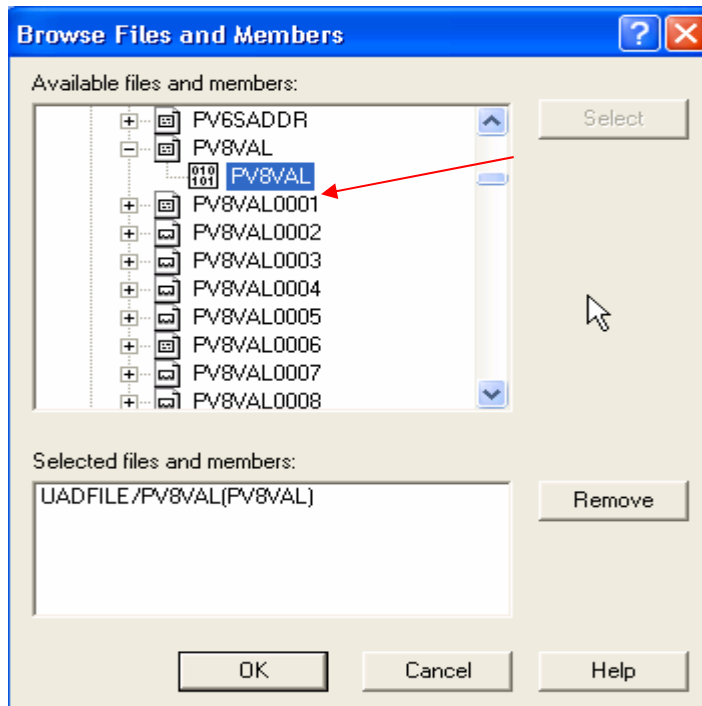
12. The “Data transfer from AS/400” window will open. In the “AS/400” section, click the “Browse” button



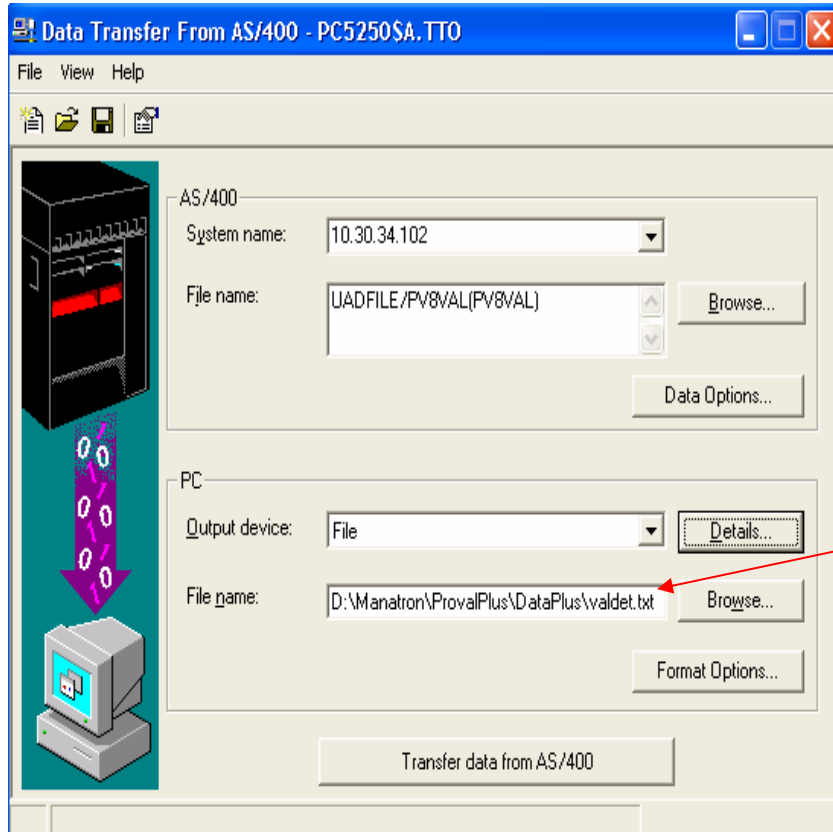
13. In the “Browse Files and Members”, expand “UADFILE”



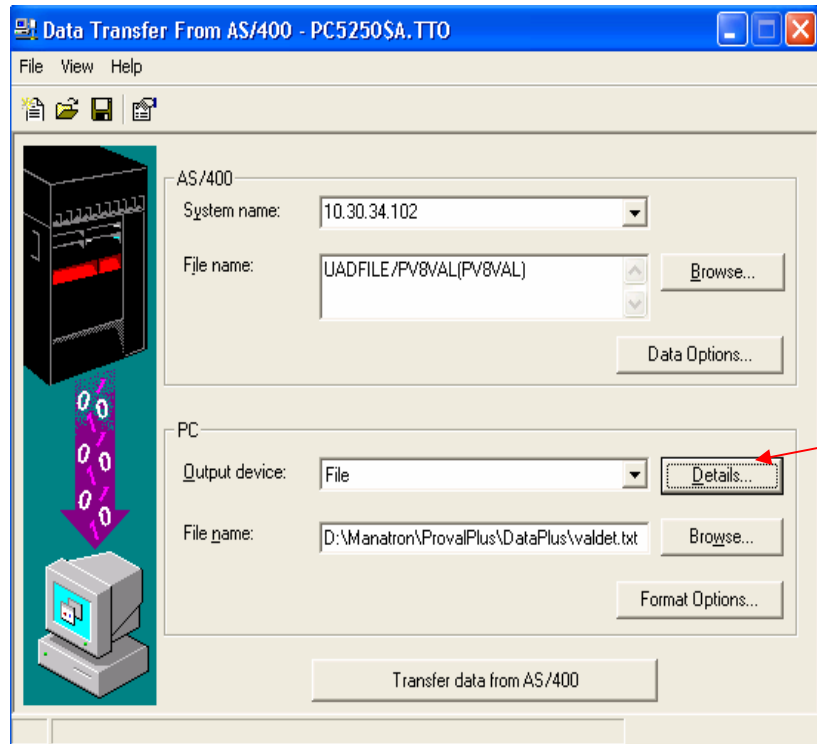
14. Scroll down to “PV8VAL”, expand it and select it’s member “PV8VAL”. Click the “Select” button, then click “OK”



15. Browse to your DataPlus folder, and name the file “valdet.txt”. This is a temporary file that will be renamed in a later step.

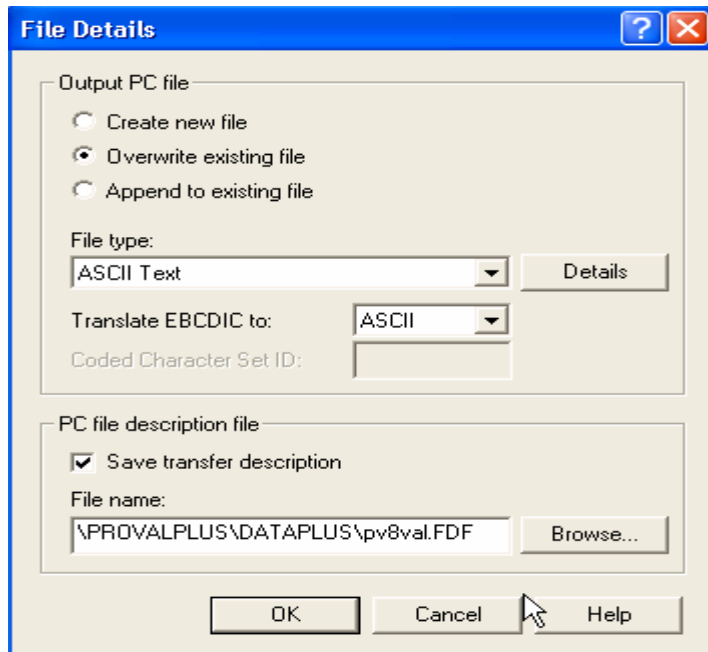


16. Click the “Details” button in the “PC” section



17. Your PC “details” should look like this.

- Check “Overwrite existing file”.
- Click the “Browse” button to navigate to your DataPlus folder. Type in the file name “pv8val.fdf”
- Click “OK”



18. Click the “Transfer Data from AS/400” button.

19. Once the PC and description files have been created, open Windows Explorer and navigate to your DataPlus folder.

- Rename valdet.txt to test.txt (This is the temporary file that we won’t be using).
- Rename valdet_orig.txt to valdet.txt (This is your original export file).

20. You are now ready to begin the uploading process again – return to step 1.

Appendix Z-1

Example of Clear Assessment Notice Status

Clear Assessment Notice Status

Area:

Parcel Selection:

- ☒ All Parcels
- ☐ Input File
- ☐ Parcel Set

Property Classes:

- ☒ All Property Classes
- ☐ Range: to
- ☐ Agricultural
- ☐ Mineral
- ☐ Industrial
- ☐ Commercial
- ☐ Residential
- ☐ Exempt
- ☐ Utility
- ☐ Other classes

Taxing District:

- ☒ All Districts
- ☐ District:

From:

To:

Select parcels to process.

Statistics:

Parcel:	Count	Selected:	Filtered:	Processed:
Start Time:				
Elapsed Time:				
Avg. Parcel Time:				
Est. Time Left:				

OK Quit Selection Options...

Be sure this says 001

Be sure "All Parcels" is clicked on.

Assessment Notice Options

The assessment notice status will be cleared for selected parcels which have value changes with the given reason code within the given range of effective dates.

THIS PROCESS CANNOT BE UNDONE. MAKE SURE YOU HAVE A GOOD BACKUP BEFORE CONTINUING!

Effective dates: to

☐ Only clear the most recent valuation record

☒ All reason codes

☐ Reason code:

OK Cancel

Effective dates from 1/1/1900 through today.
And choose "All reason codes."
Click "OK" when you are ready to clear the notice status.

Appendix Z-9

Changing of Calculation Year

Path: Applications Window | Tables | Provaluation Engine Table | Residential Age/Factors

ProValuation Engine

VALUE ELEMENT GROUPS

- ☐ Dwelling Base Value Elements and Modifiers
- ☐ Dwelling Exterior Features: Porches, Patios, Garages, etc.
- ☐ Outbuildings and Modifiers
- ☐ Manufactured Housing and Modifiers
- ☐ Dwelling Additions and Modifiers
- ☒ Grades, Age Adjustments and Other Factors
- ☐ Commercial Yard Items and Modifiers
- ☐ Commercial Special Features and Modifiers

Value Item Category

GRADES

- Improvement Factors
- Exterior Feature Factors
- Dwelling Factors *
- * (Addns, Garages, Carports defaults)
- Dwelling Attachments Factors *
- * (Additions, Garages, Carports)
- Manufactured Housing Factors
- Overall Default Factors
- Class Factor Adjustments
- Grade/Class Table Option

Model Serial Number

IN 4306

OUT 4306

Buttons: Next Model, Save, Select, Exit

Please verify your selection of tables.

Are the model serial numbers in and out correct?

Buttons: Yes, No

Select Grades, Age Adjustments...

Enter your current costing model number here, for both In & Out, then click "Select". Then click Yes if model number is entered correctly.

ProValuation Engine

VALUE ELEMENT GROUPS

- ☐ Dwelling Base Value Elements and Modifiers
- ☐ Dwelling Exterior Features: Porches, Patios, Garages, etc.
- ☐ Outbuildings and Modifiers
- ☐ Manufactured Housing and Modifiers
- ☐ Dwelling Additions and Modifiers
- ☒ Grades, Age Adjustments and Other Factors
- ☐ Commercial Yard Items and Modifiers
- ☐ Commercial Special Features and Modifiers

Value Item Category

- Overall Default Factors
- AGE ADJUSTMENTS
- Improvement Specific Tables
- Outbuilding Default Tables
- Residential Default Tables
- Residential Numbered Tables
- Manufactured Housing Tables
- Commercial Default Tables
- Commercial Numbered Tables
- Dwelling Attachments Factors *
- * (Garages and Carports)
- BASE YEAR FOR AGE CALCULATION**
- Default for Residential Improvements
- Personal Property Mobile Homes
- SUBSTITUTE IMPROVEMENT CODE
- Substitutes for Age Adjustments
- FINISH ADJUSTMENTS
- Finish +/- quality factors

Model Serial Number

IN 4306

OUT 4306

Buttons: Save, Select, Exit

ProValuation

Default for Residential Improvements

The age calculation base year for age adjustments in the above category is:

2004

Buttons: OK

Highlight this entry, then click "Select".

Enter your next assessment year here, then click OK.

Then Save and Exit.